

Management, marketing and population of repositories

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Outline

- Marketing and population of repositories – the advocacy process
- Management of repositories – policies and choices

Population & marketing – Advocacy!

- Clearly recognised that key element of a successful repository is persuading stakeholders of its worth and thereby persuading them to deposit
- Has become known as ‘Advocacy’
- Likely to be significantly more challenging than the technical aspects of setting up a repository
- An institutional advocacy campaign is key to spreading the message about open access and populating your repository

Advocacy – what does it mean?

- Explaining the concept of open access and repositories to stakeholders (academics, university management etc.)
- Persuading stakeholders of the benefits and advantages of open access
- Reassuring stakeholders about their concerns (copyright issues, versions of papers, how to deposit etc.)

Advocacy – key challenges

- Message needs to be repeated and reinforced
- Different messages may be needed for different audiences and potentially for different discipline areas – key drivers for open access may differ
- Important to stress the positive outcomes of open access and not focus solely on problems with access to scholarly communications

Getting the message across

- Important to use all possible communication channels
- Possibilities include: events (invited and open), leaflets, newsletters, targeted e-mails, presentations to departments or committees or groups of staff
- Setting context is important, but even more important is explaining exactly what you want people to do and how they should do it
- Important to have a version of your repository to demonstrate

Possible author reactions

- Interested in the concept of OA, but not all wildly enthusiastic
- A lot of confusion over open access and what it meant for them
- Many happy to participate if someone else does the work
- Concerned about possible implications of funding body OA policies
- Those with a stake in journals may be concerned about the impact on the future of journals

Issues raised by academics

- Why should they bother depositing?
- Perceived potential for copyright infringement
- Confusion between OA journals and OA repositories
- Concern about the possible collapse of the current publishing system (particularly peer review) and the possible impact, especially on small society publishers
- How will people find material in repositories?

Copyright issues raised by academics

- Academics fear that they may be breaking copyright agreements by depositing in repositories
- Academics often do not have the time/inclination to check if they are permitted to deposit a paper
- Complications of interpreting publishers copyright agreements

Issues for university management

- What's in it for them and for the university?
- Alignment with the strategy of the institution
- Is it going to create more work for academics?
- How much is it going to cost?

Key success factors

- Support of heads of departments/schools or key academics helps
- Deposit does not require lots of additional work for academics
- Repository staff will check/advise on copyright
- Authors can see key benefits of deposit

Populating your repository

- Having initial good quality content is very important (ideally not content from library staff)
- Possible option – seek out local authors interested in OA (e.g. those who have published in OA journals) and make some of their publications available
- Explore discussions with local publishers who might permit content to be deposited

Populating your repository - ongoing

- Continuing advocacy campaign
- Offer to go and talk to individual departments/subject areas
- Ensure authors know that you can help and advise on e.g. copyright, file formats, how to deposit etc.
- Consider trying to implement a policy/mandate – however, perhaps best not to do this straight away

Ongoing persuasive tactics

- Usage statistics – downloads of papers
- Citations – increase in citations for freely available material
- Visibility in search engines such as Google and Yahoo

Management

- Even if authors are self-depositing management of your repository is still necessary
- Some element of staffing will be needed, both at the start when setting up and on an ongoing basis
- Policies for the repository will need to be developed

Management – repository policies

- Range of possible policies to be developed:
 - Content and Submission policy
 - Metadata policy
 - Policy for full text items
 - Preservation policy
- Useful policy creation tool: OpenDOAR policies tool

http://www.open_doar.org/tools/en/policies.php

Content and submission choices

- What sort of content are you seeking for your repository? Only published material? Theses? Images? Data?
- Who will you accept content from? Only staff at your institution? Students? How about publications produced by staff now at your institution written while they were at another institution?

Content and submission choices

- Models for deposit: self-deposit/archiving and/or mediated deposit?
- Workflows for managing the repository
- Managing versions of papers
- Digitising material
- Withdrawal of material
- Relationship with other repositories

Metadata Policies and Metadata Re-use

- What is the minimum level of metadata you will accept?
- Range of Metadata
 - Descriptive
 - Technical
 - Administrative
- Metadata Re-use Policy
 - Can it be used commercially?

Policy for full text items

- Will you only accept full text or will you also accept bibliographic details plus links to versions on publishers' sites?
- Full text or metadata only repository
- Acceptable document types

Preservation policy

- Will you build in a guarantee of preservation of the items in your repository?
- What preservation activities will you carry out?
- Will you preserve everything? Some types of content may need special attention, e.g. theses

Advocacy: conclusions

- Do not underestimate the importance of advocacy
- People may not be enthusiastic straight away – be prepared to repeat your message
- Most important thing is to stress the benefits of open access and ensure deposit is as straightforward as possible

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